
Strategic Growth
of the
National Wildlife Refuge System

U.S. Fish & Wildlife Service White Paper
for the
Conservation in Action Summit



Conservation in Action Summit

A new century of conservation challenges

Strategic Growth Team Members

Jon Andrew, Regional Chief, NWRS Region 4
Molly Brown, President, Friends of Back Bay NWR, VA
Dirk Byler, Strategic Growth Coordinator, NWRS Headquarters
Gary Kania, Senior Policy Advisor (FWS/NPS), The Nature Conservancy
Jon Kauffeld, Refuge Supervisor, NWRS Region 3
Robert MacCall, Division of Realty, NWRS Headquarters
Noah Matson, Director, Public Lands Program, Defenders of Wildlife
Seth Mott, Wildlife Biologist, FWS Division of Bird Habitat Conservation
Wayne Ostlie, Senior Manager, Global Priorities Group, The Nature Conservancy
Tom Sadler, Associate Conservation Director, The Izaak Walton League
Gary Sullivan, NWRS Division of Realty (Montana Office)

Co-Chairs:

Nancy Gloman, Former Chief, Division of Conservation Planning & Policy, NWRS Headquarters
Eric Alvarez, Chief, Division of Realty, NWRS Headquarters

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Executive Summary

Thanks to the efforts of Service staff and partners, the National Wildlife Refuge System plays a crucial role in protecting species and the ecosystems on which they depend.

The National Wildlife Refuge System Improvement Act of 1997 established a mandate for the Refuge System to formulate a more coherent approach to its growth. The strategic growth team identified four essential elements critical to strategic growth. They are based on the legislative direction in the Improvement Act, the reports developed through *Fulfilling the Promise*, and an understanding of the key conservation planning and biological evaluation tools developed by the Service and its partners:

- 1) A clear definition of the unique role of the Refuge System in achieving national conservation goals within the greater U.S. protected area network.
- 2) Establishment of national, regional, and ecoregional habitat objectives based upon the resource needs of Service conservation targets (species and ecosystems).
- 3) Well-coordinated national priorities to guide future Refuge System acquisitions.
- 4) Collaborative, science-based conservation planning to complement the efforts of partners to achieve shared conservation goals.

The National Wildlife Refuge System Improvement Act of 1997 established a mandate for the Refuge System to formulate a more coherent approach to its strategic growth.

Each element functions with the others to ensure all future refuges and refuge expansions are the optimal conservation solution (in terms of biological value, cost, and public support) for achieving the Service's conservation objectives. Consideration of each element provides the context for narrowing the universe of opportunities for establishing new refuges or refuge expansions and focuses the Service on a smaller number of high quality lands that may be appropriate for a new refuge if a conservation opportunity arises.

The strategic growth team recommends the Service implement the following recommendations:

- 1) Develop new policy for strategic growth in collaboration with states and partners that directs the Refuge System to implement a conservation planning process that adequately addresses the four subcomponents articulated in this white paper and meets the requirements of the Improvement Act and *Fulfilling the Promise*.
- 2) In supporting a new policy on strategic growth, direct new and existing resources to the implementation and continued development (with partner involvement) of the biological planning process laid out in the Refuge System report, "A Process for Integrating Wildlife Population, Biodiversity, and Habitat Goals and Objectives on the National Wildlife Refuge System."

The Refuge System is the conservation jewel of the nation's system of public lands.

- 3) Establish a cross-program team to guide the Service in implementing a collaborative science-based approach to landscape-level planning.
- 4) As part of a new policy on strategic growth, finalize with partners a set of threshold standards that ensures that all future refuges and expansions fit the unique role of the Refuge System.
- 5) As part of a new policy on strategic growth, expand the Refuge System's Land Acquisition Priority System to include an evaluation of the relative national conservation importance of proposed refuges and expansions.

With an appropriate allocation of resources toward carrying out the recommendations listed above, the following products should be completed:

- 1) Spatially explicit conservation priority maps for each of the Service's ecosystems. These maps should be derived using the process described in the Refuge System's report concerning "Habitat Goals" to ensure they integrate national Service goals and objectives.
- 2) A database of habitat objectives and deficits for the Service's ecosystems based upon the resource requirements of Service conservation targets (species, species groups, and ecosystem types).
- 3) A national outreach strategy to communicate the special value of Service conservation priority areas to promote conservation action by all interested parties in these areas.
- 4) A national assessment of the current and potential conservation value of existing refuges in meeting Refuge System goals and objectives.

Introduction

The Refuge System is the conservation jewel of the nation's system of public lands. Serving as anchors of key habitat within a diverse range of ecosystems, refuges provide a small, yet critical, portion of the habitat necessary to meet the public's long-standing interest in ensuring the survival of the nation's fish, wildlife, and plant resources. The Refuge System acts in concert with other public and private lands to meet the critical resource needs of migratory birds, endangered species, key fish and marine mammal populations, and the ecosystems upon which all species depend.

The topic "strategic growth" is multifaceted, ranging from the biological importance of Refuge System additions to the financial implications of their management to the political ramifications inherent in all federal land acquisition decisions. The term "strategic growth" implies that every addition to the Refuge System is the optimal conservation solution within a given landscape (in terms of biological value, cost, and

public support) for achieving the Service’s mission. Additionally, strategic growth of the Refuge System also implies that all refuges are routinely assessed to better understand their contribution to the mission. In essence, strategic growth hinges on (1) an assessment of how current refuges meet the Service’s mission, and (2) implementing an approach to set and realize priorities.

The desire to establish a refuge for every potential conservation opportunity must be tempered by financial and political realities as well as the fact that other conservation tools and partners may be able to achieve the same or similar conservation objectives. Given the wide array of participants (states, land trusts, other land management agencies, private landowners, etc.), identification of an “optimal” conservation solution — whether new refuge, an easement, acquisition by a private land trust, state, or other federal agency — requires regular coordination among partners and a shared understanding of priorities.

In considering the concept of strategic growth, it is also important to recognize that conservation is largely a local phenomenon. The Refuge System exists today as a collection of unique habitats that are protected largely due to local interests that were extremely passionate in conserving lands that were threatened, loved, and fought for. Key to the success of the Refuge System has been the devoted passion of refuge staff and other Service employees in furthering the conservation of migratory birds, anadromous fish, threatened and endangered species, and the ecosystems they depend upon. Refuge staff and other Service employees involved partners, worked with citizen support groups, sportsmen’s clubs, congressional offices, and the Service itself to harness the funding and support necessary to purchase the lands and manage them productively.

Purpose and Need

The future health and vitality of America’s fish and wildlife depend upon the ability of the Refuge System to conserve areas of highest national priority in a manner that best complements other agencies, states, partners, and all relevant conservation efforts. New policy is required to guide the Refuge System into become more strategic in its conservation efforts to meet the mandate of the Improvement Act and *Fulfilling the Promise*, the guiding vision document for the Refuge System.

Over the past 100 years, “opportunistic” growth of the Refuge System has led to a patchwork of land units with vastly different purposes, size, and biological importance. Many of the lands are critical to the survival of the species and ecosystems.

The challenges confronting the Refuge System in the coming 100 years will likely require a more focused, strategic approach to land conservation than the past. In an era of ever dwindling natural habitat, how well the Refuge System identifies and protects the most critical lands and waters will largely determine how successfully the United States delivers healthy ecosystems and viable species populations to future generations. Identifying the optimal collection of new and existing lands for the Refuge System requires a more holistic and scientifically rigorous approach.

The Refuge System needs to articulate its priorities for establishing new and expanded refuges as called for in the Improvement Act. Until a mechanism for establishing scientifically credible, financially reasonable, and politically feasible priorities are articulated, the Refuge System will likely continue to grow without proper regard to protecting the lands with the greatest potential to provide healthy habitats to the species and ecosystems that the Service has a mandate to protect. The purpose of this white paper is to articulate a vision and a series of recommendations to guide the strategic growth of the Refuge System. The vision and recommendations are based upon the Improvement Act, *Fulfilling the Promise*, and the subsequent reports made by *Promise* teams, as well as the input of our partners involved in the strategic growth team.

Improvement Act Direction

The Improvement Act calls upon the Service to “plan and direct the continued growth of the System in a manner that is best designed to accomplish the mission of the System, to contribute to the conservation of the ecosystems of the United States, to complement efforts of States and other Federal agencies to conserve fish and wildlife and their habitats, and to increase support for the System and participation from conservation partners and the public.” (Sec. 5 (C)) Several other sections apply, including Section 4, Section 5 (B, E)

Fulfilling the Promise Vision

In October 1998, the first-ever Refuge System conference produced the guiding vision document, *Fulfilling the Promise*. This report’s recommendation concerning strategic growth is, “Develop a nationally coordinated approach, involving Ecosystem Teams and partners, for prioritizing lands and waters to support strategic growth in areas of greatest conservation concern.”

The *Promise* teams produced several reports recommending the adoption and implementation of exciting yet challenging new processes for the Refuge System. First and foremost, a process was defined to identify clear, scientifically credible, habitat objectives based upon the resource needs of Service conservation targets (species, species groups, and ecosystem types). The process involves science-based, collaborative planning in identifying how a diverse configuration of lands (public and private) contribute to support the Service’s conservation objectives both within Refuges and outside their boundaries. This process seeks to answer the fundamental questions of what type of habitat is necessary, how much, and where. This process is described in detail in the Refuge System report, *A Process for Integrating Wildlife Population, Biodiversity, and Habitat Goals and Objectives on the National Wildlife Refuge System: Coordinating with Partners at all Landscape Scales* (Habitat Goals). A copy can be found on the Service web site at: <http://refuges.fws.gov/ConservationSummit/StrategicGrowthTeam/>.

Because the unique role of the Refuge System is defined by the type and quality of lands it manages, a set of threshold standards was developed to ensure that future additions reflect the mission of the Refuge System. These threshold standards ensure that the future growth includes only those lands poised to provide a substantial contribution to Service conservation objectives. More specifically, the threshold

standards are aimed at ensuring that all lands entering the Refuge System contribute to conservation of priority species and ecosystems; are networked with other conservation lands; promote biological integrity; and are uncontaminated with environmentally hazardous materials.

Here are the proposed threshold standards developed by the team:

(1) Conserves a Priority Conservation Target *Additions should conserve a priority conservation target. Priority conservation targets are species, species groups, or ecosystem types selected for specific management objectives in a landscape planning unit. Regions should prioritize conservation targets based upon criteria established in collaboration with partners. At the national level, we will give priority to those species and/or ecosystem types that the Service has a mandated responsibility to protect.*

Priority conservation targets are species, species groups, or ecosystem types selected for specific management objectives in a landscape planning unit.

(a) Proposals that make a substantial contribution to the conservation of a targeted species and/or ecosystem types will receive a higher priority. The degree to which a proposed land acquisition significantly influences the viability of a particular species is variable. For example, a proposed 40-acre refuge that protects 20 percent of the known population of an endangered plant is easily a substantial contribution. However, a 10,000-acre refuge for waterfowl isolated from major flyways and not in the major breeding range would likely not be able to provide a substantial contribution to migratory bird conservation. On the other hand, a 2,000-acre wetland with one of 10 known colonies of Franklin's gulls would substantially contribute to that species conservation. The key is to address the contribution using historic and current information, other references, and population models as appropriate, and tie the contribution to overall population goals and objectives in the context of the larger landscape.

(b) In preparing a conservation proposal, quantify and qualify how the proposed addition contributes to objectives developed in existing conservation plans (identify source, e.g., North American Waterfowl Management Plan, Partners In Flight, endangered species recovery plans, habitat conservation plans). State why the current composition and quantity of conservation lands does not adequately protect the conservation targets identified in the proposal. Conservation lands are defined as lands, waters, or interests therein, held by state, federal, local governments, and private conservation entities. Within the proposal, attach a map showing the study area, location of the habitats targeted, and their spatial relationship to other conservation lands. The proposal must clearly make the case that the addition provides substantial benefits to priority species and/or ecosystem types that are superior to benefits derived by alternative conservation options. Explicitly state alternative conservation options in the proposal and the consequences of not taking actions recommended by the proposal, specifically the expected impact on the specified conservation targets.

The urgent need to prevent the extinction of an endangered species may outweigh the need to ensure that the new addition to the Refuge System is adequately networked.

(2) Provides Habitat Connections *Additions should be networked with conservation lands to meet the targeted distribution and connection requirements.*

(a) The conservation proposal should identify the habitat distribution and connection needs of the conservation targets. Describe how the lands identified within the proposal are currently or could be appropriately networked with other conservation lands to meet these requirements. Explain how the proposal provides corridors to existing conservation lands to ensure genetic exchange and long term health for a species. For example, if the proposal is a necessary stepping-stone in association with other conservation lands for migrating birds, provide explicit examples. Explain how other similar habitats are spatially arranged so that collectively with the proposal, all lands and waters are more structurally and functionally sound.

(b) If habitat connections are not required, explain why. For example, the conservation of an endangered species may necessitate land protection in an area not in close proximity to other conservation lands. In this case, the urgent need to prevent the extinction of an endangered species may outweigh the need to ensure that the new addition to the Refuge System is adequately networked. If this is the case, provide a detailed explanation as to why the proposed addition is the optimal choice in conserving the targeted species. Furthermore, explain how acquisition of the proposed land will ensure the viability of the species.

(3) Promotes Biological Integrity *Additions should encompass sufficient land and water to conserve (protect, restore, and manage) the structure and function of the project area and meet a life-cycle requirement for the target species.*

(a) Explain how the proposal includes sufficient size to adequately protect, restore, and manage the targeted trust species and their habitats. Identify the sufficient interest in land and water necessary to conserve (protect, restore, and manage) the structure and function of the project area. Describe whether the project area is sufficient to allow for necessary habitat management activities and satisfy spatial requirements of target species. Describe how the project would alleviate threats to the trust resources, including those caused by anticipated land use changes in the surrounding area such as residential, commercial, agricultural, subsurface developments, and rights of way.

(b) Explain how the proposal includes adequate water rights, availability of water, sufficient access, and whether there are deed restrictions or reserved subsurface rights that would interfere with management. Address proposed and existing uses or rights that may not be compatible with the primary purposes of this proposal. Include in the proposal how we will obtain sufficient interests through the acquisition of fee and easement interests, leases, and cooperative agreements?

(c) The Service's policy on Biological Integrity, Diversity, and Environmental Health (601 FW 3.17) states that the Service will take a proactive approach with

partners to identify lands that are critical for maintaining or restoring the biological integrity, diversity, and environmental health at all landscape scales.

(4) Invests in Healthy Lands *Additions should not be contaminated or impacted by off-site contamination to a level that may impair our ability to accomplish the project goals.*

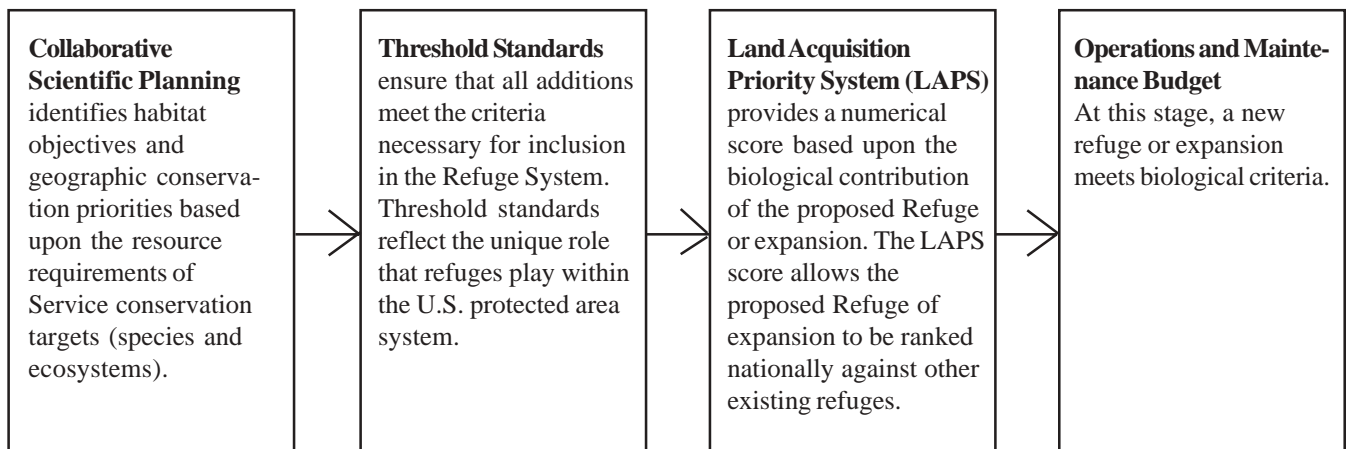
Additions to the Refuge System should not be contaminated or impacted by off-site contamination to a level that may impair our ability to accomplish the project goals.

(a) Review the Comprehensive Environmental Response Cleanup Liability Act (CERCLA) and other applicable databases for potential contaminants in the study area. Discuss the status of site investigations, potential liability or ongoing litigation, remediation, feasibility of the remediation without impairing our ability to protect or manage an area, and estimated cost.

Because it is necessary to understand how existing and proposed refuges and refuge expansions compare nationally, the Service's Land Acquisition Priority System (LAPS) should be expanded to evaluate the relative conservation importance of current and proposed refuges and expansions. In its current form, LAPS provides a numerical score based on the biological value of each refuge with an existing potential for land acquisition. The revised process would evaluate new refuges and expansions against existing refuges to evaluate their relative national importance prior to their approval. None of the *Promise* team's recommendations has become official Service policy. A forthcoming Director's Order on Strategic Growth, when signed, will partially implement these recommendations.

The relationship of the *Fulfilling the Promise* recommendations is depicted in the following figure.

Figure 1
Strategic Growth Process Developed Through
Fulfilling the Promise



The processes work in concert to ensure that:

- 1) for any particular land conservation opportunity the full spectrum of conservation solutions are considered in order to determine whether the establishment of a new refuge is the best choice or whether a state park, NGO reserve, or alternative conservation tools will provide an equal or greater benefit to the resource.
- 2) there is a direct link between the proposed refuge and its contribution to the habitat objectives of Service conservation targets (species and ecosystems).
- 3) proposed refuges and expansions pass threshold standards that reflect the distinct national role for which refuges play within the U.S. protected area system.
- 4) through the land acquisition priority system, all new refuges or expansions have a national ranking or score based upon the contribution they make to achieving the Service mission when compared to other projects.

Additionally, the strategic growth process integrates into an overall adaptive land management model, whereby the habitat objectives of new refuges are integrated within the overall habitat objectives of the Refuge System, refuge management, monitoring, and adaptation to improve results. A model of adaptive land management, which includes the role of strategic growth, is provided in Appendix II.

Essential Elements of Strategic Growth

In developing this paper, the authors identified four essential components to accomplish the strategic growth of the Refuge System. Each of the key subcomponents have two characteristics: 1) they must be anchored to the Refuge System mission through the legislative direction in the Improvement Act, and 2) they must focus on outcome-based results that can be monitored through condition assessments so success can be clearly judged. All strategies, priorities, statements and conclusions are reasonable and doable over the next 15 years.

The following essential elements were developed within the legislative direction of the Improvement Act, reports developed through *Fulfilling the Promise*, and an understanding of the key conservation planning and biological evaluation tools developed by the Service and its partners:

- 1) A clear definition of the unique role of the Refuge System in achieving national conservation goals within the greater U.S. protected area network;
- 2) Establishment of national, regional, and ecoregional habitat objectives based upon the resource needs of Service conservation targets (species and ecosystems);
- 3) Well-coordinated national priorities to guide future Refuge System acquisitions; and

-
- 4) Collaborative, science-based conservation planning to complement the efforts of our partners to achieve shared conservation goals.

Each of these elements functions in tandem to ensure all current and future refuges and refuge expansions form the optimal conservation solution (in terms of biological value, cost, and public support) for achieving the Service's conservation objectives. Consideration of each element provides the context for narrowing down the "universe" of opportunities for establishing new refuges or refuge expansions and focuses the Service on a smaller number of high quality lands that may be appropriate for a new refuge if a conservation opportunity arises.

Key Outcomes of Strategic Growth

The outcomes of a successful Refuge System strategic growth process as described on the following pages correspond to the four essential elements listed in the preceding section:

1. Threshold Standards are established and enforced to ensure that all current and future refuges and expansions are of the highest national quality and adequately contribute to the mission and goals of the System.

The unique role of the Refuge System should be clearly defined in relation to the nation's other protected areas (national parks, state conservation areas, land trusts, etc.). Criteria which reflect the unique role of the Refuge System should be established to ensure that current and future refuges and expansions meet the highest standards for inclusion in the System. Clear threshold standards provide the criteria to assess current and proposed refuges and expansions for the Refuge System.

Improving the stewardship and future growth of the Refuge System requires a focus on the scientific relationship of population and biodiversity objectives with respect to habitat quality, quantity, and location.

2. Habitat Objectives based upon the resource requirements of Service conservation targets (species and ecosystems) are developed to;

- provide the means for managing the Refuge System as a network of lands contributing to national objectives and that they complement the efforts of our partners.
- identify geographic priority areas at the landscape scale to focus the growth of the Refuge System within areas of greatest conservation potential.
- provide the "currency" for coordinating with partners in identifying the most optimal conservation solution whether it be an easement, a state conservation area, national park, wildlife refuge, or other tool.

Improving the stewardship and future growth of the Refuge System requires a focus on the scientific relationship of population and biodiversity objectives with respect to habitat quality, quantity, and location. To accomplish national objectives for the species and ecosystems the Service is mandated to protect, there is a need to step down population and biodiversity objectives in a fashion that provides refuge managers the means to write habitat management objectives in the context of the larger resource needs of priority species and ecosystems. Concurrently, new refuges and expansions

that are brought into the Refuge System should be selected based in part on their contribution to established habitat objectives that are clearly linked to the national objectives for species and ecosystems.

Refuge habitat objectives, management action, sample design, monitoring, and data storage and retrieval provide the key aspects of an adaptive land management model to promote the continual improvement of our management in meeting Refuge System habitat objectives (see Appendix I). Habitat Objectives provide the foundation for which we take all other actions in the Refuge System. This concept is also reflected in the final report of the *Fulfilling the Promise* Biological Inventory and Monitoring Database Team. This initiative is aimed at defining the database structure for linking habitat objectives, management actions, and monitoring data. In support of this concept, the NWRS is collaborating with USGS/BRD scientists to develop adaptive management studies on Refuges.

The financial implications (future operations and maintenance costs) for new and expanded refuges [should] not overburden the Refuge System's ability to properly manage what is in the network.

3. Clear national priorities exist for species and ecosystems that guide the Refuge System in identifying specific habitats of national importance that merit inclusion into the Refuge System. Additionally, the financial implications (future operations and maintenance costs) for new and expanded refuges are factored in to ensure that these additions do not overburden the Refuge System's ability to properly manage what is in the network. Furthermore, an ongoing national assessment determining the relevance of existing refuges is needed to ensure that (1) the Refuge System comprises the most strategic collection of lands toward meeting the Service's mission, and (2) operations and maintenance funding is directed toward areas of highest conservation value.

4. A process for collaborative, science-based ecoregional planning is established Service-wide to complement the efforts of our partners to achieve our shared conservation goals.

Over the past 15 years, tremendous innovation has occurred in collaborative science-based conservation planning. The USGS Gap Analysis Program pioneered the use of GIS in modeling species and identifying under-represented habitats. The Nature Conservancy uses a collaborative ecoregional planning approach to set geographic priorities that guide its conservation strategy. A key outcome is an explicit determination of the role that existing preserves play in the maintenance of ecoregional biodiversity. Simultaneously, the Service has also developed several models of land prioritization methods and approaches at regional and ecoregional scales, several of which identify habitat objectives based upon species resource needs. As mentioned previously, the Refuge System's *Fulfilling the Promise* report on Habitat Goals also advocates a collaborative approach to conservation.

The key in all of these approaches is applying the best available information in setting explicit goals and priorities in collaboration with partners. By doing so in a systematic manner, the Refuge System builds credibility in a shared conservation vision because we identify how best to achieve the greatest conservation return for the amount of funding available in a budget cycle.

Defining Success

Strategic Growth of the Refuge System involves many components interacting with one another in sometimes complex manners. These are the factors that can evaluate whether the Refuge System is growing strategically, i.e. in areas of highest national priority and in a manner that complement efforts of States, Federal agencies, and other private interests to conserve fish and wildlife and their habitats.

The table on the following page describes the essential elements identified by the Team for defining successful strategic growth.

Table 1
Strategic Growth Essential Elements

Essential Element	Outcome at Optimal Condition	Success Factors
Clear definition of the unique role of refuges within the larger national conservation estate.	The growth of the Refuge System over the next 15 years reflects a common understanding by the Service, other federal agencies, Congress, the States, other conservation partners, and the public of the unique role of the Refuge System.	All new refuges and refuge expansions meet a set of minimum criteria that reflect the unique role refuges play within the larger national conservation estate. An assessment is completed to understand the role that existing refuges play in that large vision.
Establishment of national, regional, and ecoregional habitat objectives based upon the resource needs of Service conservation targets (species and ecosystems).	Spatially explicit habitat objectives and priorities are available to guide the management and future growth of the Refuge System in the context of larger national conservation goals.	Spatially explicit and scientifically rigorous habitat objectives and priorities for the management and future growth of the Refuge System exist at the national, regional, ecoregional scale.
Well-coordinated national priorities to guide future Refuge System growth.	All new additions to the Refuge System will be demonstrably high priorities for achieving the goals and objectives of the NWRs, factoring in the financial and organizational constraints impacting the Refuge System.	All new refuges and refuge expansions added to the System (via purchase, donation, transfer, exchange, etc) rank above the median for all proposals using criteria established by a strategic growth process which in addition to evaluating the biological potential of the addition, factor in the financial and organizational constraints impacting the Refuge System.
Collaborative, science-based conservation planning to complement the efforts of our partners to achieve shared conservation goals.	Systematic, Servicewide collaborative planning occurs at the ecoregional level to ensure that the Refuge System works in concert with partners to identify the most optimal conservation tool to achieve Service objectives. All new and expanded refuges are of high priority to both the Service and the partners involved in the new project.	All new refuges and refuge expansions occur in areas where other conservation tools are unavailable or inappropriate. All new refuges and refuge expansions are of a high priority to both the Service and the partners involved in the new project.

Measuring Progress

Measuring progress will be monitored through a condition assessment process. Standardized condition classes are proposed to provide a consistent method to assess the Refuge System's ability to limit expansion to areas defined as of high national priority for inclusion in the Refuge System.

In establishing condition classes, the focus was to provide descriptors that are clear and easy to understand, and that provide for consistent separation among the condition classes. Condition criteria are not extremely precise but are intended to be valid and reliable reflections of performance, and are of sufficient rigor to support reasonable judgments about condition that lends itself to high level decision making. Condition class information is a diagnostic indicator to take our efforts strategically in the correct direction. It also furthers an adaptive management approach where future iterations of performance measures will become increasingly more focused over time as we gain experience with their use.

Condition classifications may have significant implications for planning and budgeting purposes; in that regard, condition classes carry the following implications for new action or additional financial resources:

- Condition Class 1 – Optimal: Represents an ideal condition where current successful approaches should be continued but no new actions or funding are needed.
- Condition Class 2 – Adequate: Represents a good condition that meets overall needs even though there may be modest weaknesses in some areas. It indicates that within the framework of the 15-year horizon of this summit, the way business is currently being done is acceptable and no new funds are called for.
- Condition Class 3 – Inadequate: Represents a less than desirable condition that clearly warrants a change in actions or increases in funding resources. Needed actions are not as urgent or imminent as those under condition class 4.
- Condition Class 4 – Critical: Represents an urgent need that warrants immediate action or increases in funding resources.
- Condition Class 5 – Unknown: Insufficient information is available to make a judgment on the condition of this component. This implies that either the component is not particularly important or that modest action or financial resources should be applied to improve understanding of the condition of this component.

Appendix I contains the condition assessment criteria, which are recommended for use in assessing the future progress of the strategic growth program.

**Where Are We
Today?**

As one of the world's premier land conservation agencies, the Refuge System continues to grow each year, adding important habitat that contributes to the conservation of the nation's ecosystems.

The growth of the Refuge System is often guided by the Service's own tendency toward opportunistic decision making. While the vast majority of refuges today contribute significantly to achieve the conservation mission of the Service, new refuges are often established not because of their 'national' significance or even the 'irreplaceability' of the habitat. Rather, new refuges are established because the critical configuration of support has been achieved through the dedicated work of Service employees, partners, the public, congressional representatives, and other interested parties. While the hard work of these parties is much needed, the Service has an obligation to better frame new opportunities within a clear set of national priorities

Another source of Refuge System growth is the transfer of military bases. The Base Realignment and Closure (BRAC) Act defines the process whereby military lands become available for transfer to other federal agencies. In the case of BRAC, there are typically no traditional land acquisition costs. However, the potential operations and maintenance costs of administering these lands can pose a significant burden to the Refuge System as a whole. Clearly, a well-formed strategic growth process needs to be in place to assist the leadership of the Service to determine which available BRAC lands the FWS will request.

An analysis by Defenders of Wildlife revealed that for fiscal years 2000, 2001, 2002, and 2003, only one-third of funded refuge land acquisition projects were based on the Service's annual budget request. Service requests are largely based on LAPS scores, which account for biological significance of land acquisition projects. Two-thirds of the projects funded during that time period were thus chosen by members of Congress using criteria not based on national significance, but on the contribution of a particular refuge in achieving conservation objectives of importance to a particular district or state.

Currently, the Service has no means of articulating its priorities for establishing a strategic Refuge System that rises to the standards called for in the Improvement Act. Until a mechanism for establishing scientifically credible, financially reasonable, and politically feasible priorities exists, the Refuge System will likely continue to grow without proper regard to protecting lands with the greatest potential to provide healthy habitats and ecosystems that the Service has a mandate to protect.

On the next page, the strategic growth team provides the preliminary ratings on the four key elements concerning the growth of the Refuge System.

*As one of the
world's premier
land
conservation
agencies, the
Refuge System
continues to
grow each year,
adding
important
habitat that
contributes to
the conservation
of the nation's
ecosystems.*

Essential Strategic Growth Element	Current Condition Class
Defining the Unique Role of the Refuge System	Class 3 – Inadequate
Establishment of Habitat Objectives	Class 4 – Critical
Well-coordinated priorities to guide future Refuge System acquisitions	Class 3 – Inadequate
Collaborative, science-based conservation planning to complement the efforts of our partners to achieve shared conservation goals.	Class 3 – Inadequate

Rationale for the preceeding ratings follows:

1. Defining the Unique Role of the Refuge System (Condition Class 3 – Inadequate)

The Refuge System falls under the definition of critical. However, some new lands meet criteria established in the draft policy on strategic growth and undoubtedly many existing refuges would meet strategic growth criteria that are established by this process. Congress currently decides approximately 60 percent of the projects funded under the LWCF, potentially leading to lands that would not meet strategic growth criteria established by this process. Other lands, such as some former military installations, have been transferred to the Refuge System, also may not meet these criteria

2. Establishment of Habitat Objectives (Condition Class 4 – Critical)

The Refuge System, through *Fulfilling the Promise*, produced a report on a process to derive habitat objectives based upon national population and biodiversity objectives: “A process for integrating wildlife population, biodiversity, and habitat goals and objectives on the National Wildlife Refuge System: coordinating with partners at all landscape scales.” Within the Refuge System and throughout the Service, discussions are underway to direct existing resources toward fully implementing a process for establishing habitat objectives. No process has yet been adopted.

3. Well-coordinated priorities to guide future Refuge System growth (Condition Class 3 – Inadequate)

The Refuge System likely falls under the definition of critical. The Service currently has a Land Acquisition Priority System (LAPS) that ranks approved projects for funding based upon their existing biological value. However, projects are not generally ranked by LAPS until approved for acquisition by the Service Director, and not all acquisitions (i.e., transfers, donations) go through LAPS. For the most part, there are

For the most part, there are no official national priorities to guide the establishment of new refuges or expanding existing ones.

no official national priorities to guide the establishment of new refuges or expanding existing ones.

Additionally, financial implications must be considered to create a more strategic Refuge System that reflects agency priorities. The impacts of adding new refuges must be assessed relative to those of the current Refuge System. Operations and maintenance costs of new refuges can add a heavy burden to the management of the overall System; similarly, costs associated with existing refuges that do not contribute to the mission deflect from the Refuge System's ability to grow strategically. Often new refuges with relatively high operations and maintenance costs are added without a concurrent permanent rise in the Refuge System budget. These impact the Refuge System by reducing the quality of management on existing refuges due to lower availability of operations and maintenance funds.

One approach used in 2003, and to be used in the future, was the creation of a line item in the Refuge System budget for new and expanded refuges operations and maintenance (O&M) funding. The intention was to more clearly link the need for increased O&M expenditures to fund the creation of new and expanded refuges. However, no official guidance has yet been adopted.

The Director's Order on Strategic Growth will provide interim guidance concerning priorities that can be used to guide future acquisition (see Appendix II). The Order will establish threshold standards for new and expanded refuges, encourage science-based collaborative planning, and ensure a more direct linkage between new refuge approval and available operations & maintenance funding.

4. Collaborative, science-based conservation planning to complement the efforts of our partners in order to achieve shared conservation goals (Condition Class 3 – Inadequate)

Currently the majority of new lands added to the Refuge System (via purchase, donation, transfer, exchange, etc.) are not typically the result of a collaborative planning effort. However, several collaborative, landscape-level planning efforts are underway and have resulted in several approved new projects.

Relationship to Nationwide Conservation Efforts

The Refuge System contributes to the national conservation estate that includes various federal agencies, states, municipalities, private land trusts, and a myriad of additional private/public land use agreements. Defining the unique role of the Refuge System vis-à-vis other conservation lands provides an understanding of how future growth of the Refuge System can best complement other efforts in achieving national conservation goals. Ensuring that all new refuges or refuge expansions aspire to meet the unique role of the Refuge System requires a set of minimum criteria, or "threshold standards."

The potential to raise the conservation value of the federal public lands system, in particular, through implementing a strategic approach to conservation cannot be

understated. The Refuge System along with the National Park System, Bureau of Land Management, and the Forest Service provide the public estate for which all federal land management actions can best influence national conservation goals. Growth of the Refuge System needs to act in concert with the other federal land management agencies to ensure that we bring the highest priority lands for inclusion in the national public lands systems. Furthermore, the growth of the Refuge System should complement the efforts of other federal agencies to ensure that the nation's biological diversity is adequately represented.

Several private land trusts operating at a national level (i.e., The Nature Conservancy, The Conservation Fund, Trust For Public Lands, etc.) have developed detailed processes for identifying high priority areas for acquisition and management. The strategic growth of the Refuge System depends upon working in collaboration with these private groups to develop a shared understanding of common priorities. Because these organizations often advocate the creation of a new refuge, it is imperative that the Service employs a collaborative biological planning process that defines Refuge System habitat objectives based upon Service mandates. Through such a process we can best work with private groups to develop joint proposals involving the creation of a new refuge.

Concurrently, through the State Wildlife Grant planning process, each state will develop a comprehensive wildlife conservation plan, identifying geographic priority areas on which to focus their activities and funds. Growth of the Refuge System, if strategic, can complement state activities by ensuring that areas of national significance for conservation are properly protected.

The Refuge System report, *“A Process for Integrating Wildlife Population, Biodiversity, and Habitat Goals and Objectives on the National Wildlife Refuge System: Coordinating with Partners at all Landscape Scales (Habitat Goals)”* outlines a process whereby federal, state, and private entities can coordinate their management and acquisition decisions to achieve national goals and objectives. Implementation of this process, coupled with the establishment of threshold standards, and national ranking of proposed refuges through LAPS, will ensure that the Refuge System fulfills its unique role in contributing to the greater conservation estate of the United States.

Where Do We Start? Developing Shared Priorities

The strategic growth team recommends the Service implement the following recommendations:

- Develop new policy for Strategic Growth in collaboration with states and partners that directs the Refuge System to implement a new conservation planning process that adequately addresses the four subcomponents articulated in this white paper and meets the requirements of the Improvement Act and *Fulfilling the Promise*.

-
- In supporting a new policy on strategic growth, direct new and existing resources to the implementation and continued development (with partner involvement) of the biological planning process laid out in the Refuge System Report:,"A Process for Integrating Wildlife Population, Biodiversity, and Habitat Goals and Objectives on the National Wildlife Refuge System."
 - Establish a cross-program team to guide the Service in implementing a collaborative science-based approach to landscape-level planning.
 - As part of a new policy on strategic growth, finalize with partners a set of threshold standards that ensure that future refuges and expansions fit the unique role of the Refuge System.
 - As part of a new policy on strategic growth, expand the Refuge System's Land Acquisition Priority System to include an evaluation of the relative national conservation importance of proposed refuges and expansions.

With an appropriate allocation of resources to carry out the recommendations listed above, the following products should be completed.

- 1) Spatially explicit conservation priority maps for each of the Service's ecosystems. These maps should be derived using the process described in the Refuge System's report concerning "Habitat Goals," to ensure that they properly integrate national Service goals and objectives.
- 2) A database of habitat objectives and deficits for the Service's ecosystems based upon the resource requirements of Service conservation targets (species, species groups, and ecosystem types).
- 3) A national outreach strategy to communicate the special value of Service conservation priority areas to promote further conservation action by all interested parties in these areas.
- 4) A national assessment of the current and potential conservation value of existing Refuges in meeting Refuge System goals and objectives.

Appendix I

Performance Assessment Criteria

Strategic Growth

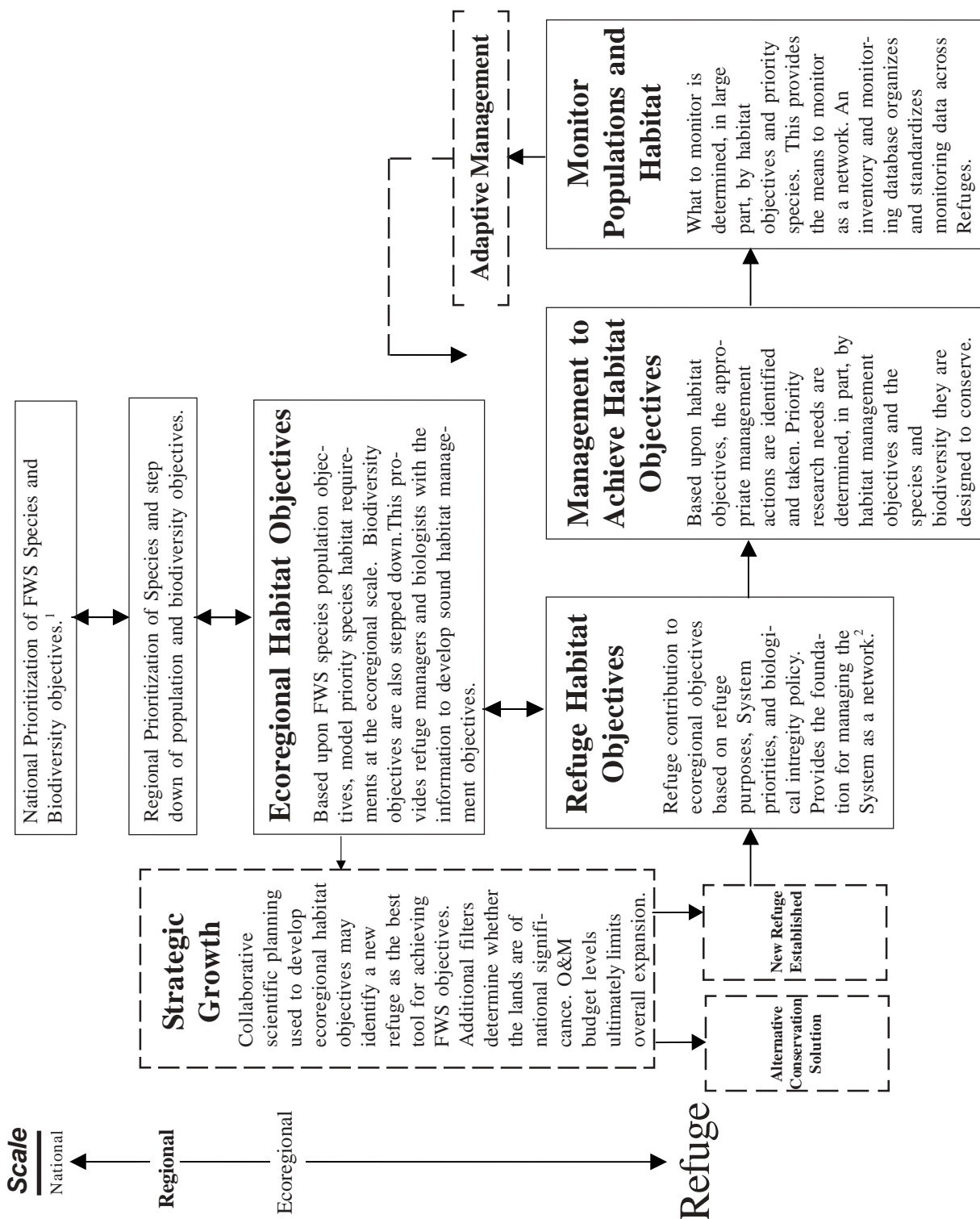
Condition Class	Essential Elements			Collaborative, science-based conservation planning to complement the efforts of our partners to achieve shared conservation goals.
	Defining the Unique Role of the Refuge System	Establishment of Habitat Objectives	Well-coordinated priorities to guide future Refuge System acquisitions	
Condition Class 1 Optimal	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) fit criteria established by the strategic growth process reflecting the unique role of the Refuge System. See comments on key subcomponent: Plan collaboratively.	Credible, spatially explicit habitat objectives and priorities exist for 100 percent of Refuge System conservation targets.	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) rank above the median for all proposals using criteria established by a strategic growth process set forth in a nationally coordinated approach to prioritize lands, factoring in the financial, political, and organizational constraints impacting the Refuge System.	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) are a result of a collaborative planning effort; all lands currently in the Refuge System have been assessed through a collaborative process as to their value in achieving the Services conservation mission.
Condition Class 2 Adequate	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) that the Service has initiated (ie. lands not mandated by Congress or other entities) fit criteria established by the strategic growth process reflecting the unique role of the Refuge System.	Credible, spatially explicit habitat objectives and priorities exist for 75 percent of Refuge System conservation targets.	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) that the Service has initiated (ie. lands not mandated by Congress or other entities) rank above the median for all proposals using criteria established by the strategic growth process set forth in a nationally coordinated approach to prioritize lands, factoring in the financial, political, and organizational constraints impacting the Refuge System.	All new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) that the Service has initiated (ie. lands not mandated by Congress or other entities) are a result of a collaborative planning effort.
Condition Class 3 Inadequate	The Service and Congress add lands to the Refuge System that do not meet criteria established by the strategic growth process reflecting the unique role of the Refuge System.	Credible, spatially explicit habitat objectives and priorities exist for 50percent of Refuge System conservation targets.	The Service and Congress add lands to the Refuge System that rank below the median for all proposals using criteria established by the strategic growth process set forth in a nationally coordinated approach to prioritize lands, factoring in the financial, political, and organizational constraints impacting the Refuge System.	Some new lands included in the Refuge System (via purchase, donation, transfer, exchange, etc) that the Service has initiated are not the result of a collaborative planning effort.

Condition Class	Essential Elements			
	Defining the Unique Role of the Refuge System	Establishment of Habitat Objectives	Well-coordinated priorities to guide future Refuge System acquisitions	Collaborative, science-based conservation planning to complement the efforts of our partners to achieve shared conservation goals.
Condition Class 4 Critical	The Service does not complete a Strategic Growth policy. There is no guidance for prioritizing lands in the system. Most new lands do not meet the criteria established by the strategic growth process reflecting the unique role of the Refuge System.	Credible, spatially explicit habitat objectives and priorities exist for less than 25 percent of Refuge System conservation targets.	The Service does not complete a Strategic Growth policy. There is no guidance for prioritizing lands in the system. Most new lands do not meet the criteria established by the strategic growth process set forth in a nationally coordinated approach to prioritize lands, factoring in the financial, political, and organizational constraints impacting the Refuge System.	The Service does not participate in collaborative planning efforts for new or existing lands.
Condition Class 5 Unknown	Insufficient information available to judge condition.	Insufficient information available to judge condition.	Insufficient information available to judge condition.	Insufficient information available to judge condition.

Appendix II

The National Wildlife Refuge System

Process to Improve the Integration of Science and Management on Refuges

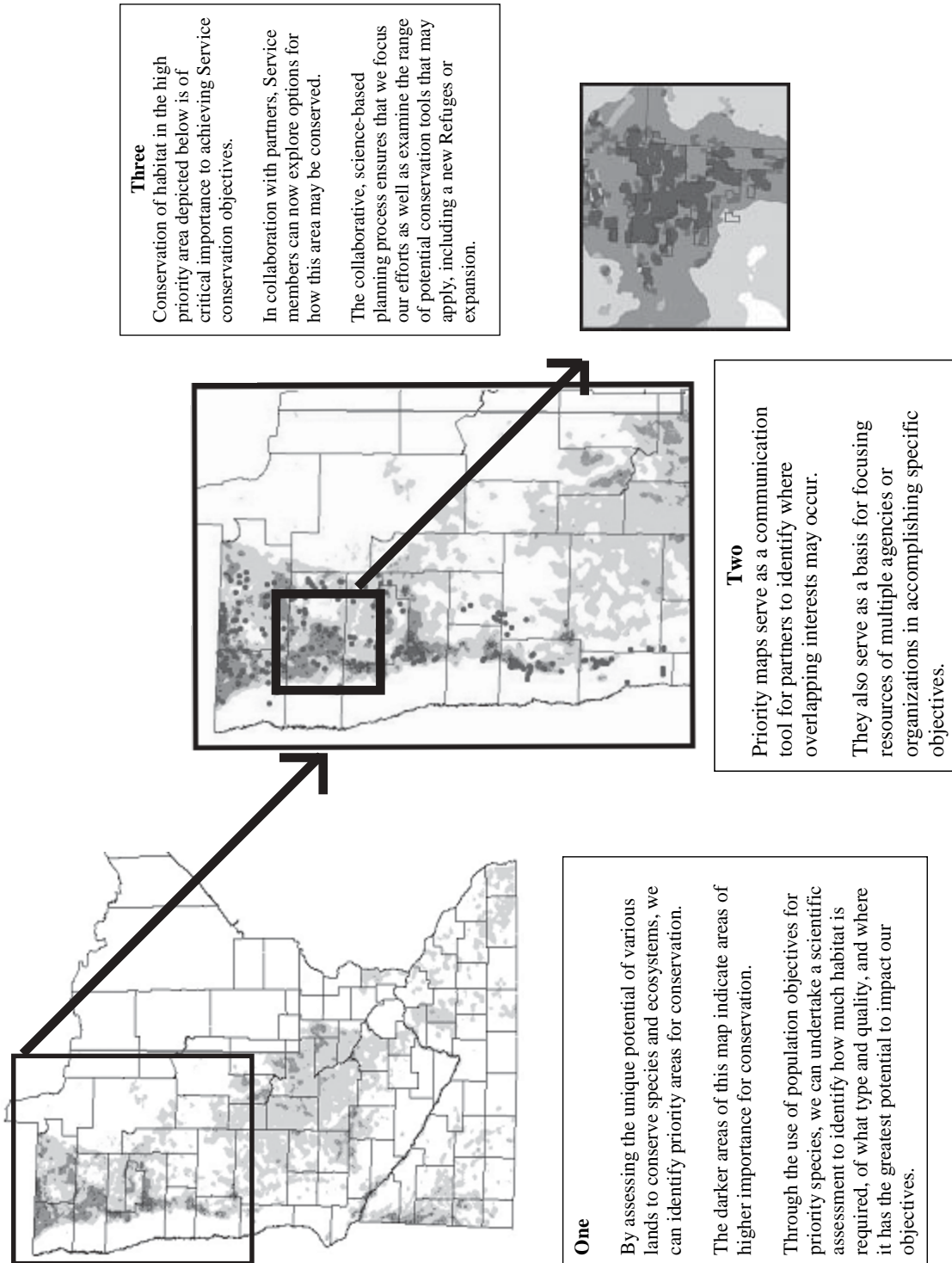


¹ FWS species objectives are derived from species plans (recovery plans, North American Waterfowl Plan, and other FWS approved plans). Biodiversity objectives are derived from identification of underrepresented 'ecological systems' within the national conservation estate.

² The process of stepping down objectives is iterative and flows both up and down. Refuges step habitat objectives back up through the process based upon what they define as their habitat management objectives

Appendix III

Collaborative Science-based Planning to Achieve FWS Objectives



Appendix IV Draft Director's Order on Strategic Growth

D R A F T
October 2003

DIRECTOR'S ORDER NO. _____

Subject: Interim Guidance for Strategic Growth of the National Wildlife Refuge System

Sec. 1 What is the purpose of this Order? This Order outlines the priorities and guidelines used to evaluate lands proposed for inclusion in the National Wildlife Refuge System (System).

Sec. 2 What is the scope of this Order? This Order guides decision making on all proposed national wildlife refuges, refuge expansions, and additions to existing refuges through purchase, exchange, transfer, donation, withdrawal, or other existing authorities.

a. We will make no acquisitions (or commitments for acquisition) outside of an approved refuge boundary prior to approval by the Director or the Regional Director for those expansions the Regional Directors are authorized to approve. This is consistent with the Fish and Wildlife Service Manual policy on Nonprofit Organization Acquisition (341 FW 5.7A) that only a Director may make a commitment to land acquisition for lands that fall outside an approved boundary.

b. Currently, Regional Directors have authority to add up to 40 acres (or 10 percent of the acreage within the approved refuge boundary, whichever is greater) to existing refuges. In such instances, we now require an annual report to the Director detailing such acquisitions, including the number of acres acquired and the acquisition, operations, and maintenance costs. For all proposals exceeding this threshold, a proposal must be prepared and approved by the Director or through congressional action.

c. This guidance does not pertain to the Small Wetlands Acquisition Program for adding waterfowl production areas and other habitat easements to meet the needs of waterfowl and other migratory birds in the Prairie Pothole Area in Montana, North and South Dakota, Minnesota, and Iowa, as well as the significant small wetland areas in Nebraska, Wisconsin, Michigan, Idaho, and Maine.

Sec. 3 What is the authority for this Order? The National Wildlife Refuge System Administration Act of 1966, as amended by the National Wildlife Refuge System Improvement Act of 1997 (16 U.S.C.668dd-668ee, as amended).

Sec. 4 Why is this Order needed? The Refuge Improvement Act of 1997 directs the Secretary of the Interior to "Plan and direct the continued growth of the System in a manner that is best designed to accomplish the mission of the System, to contribute to the conservation of the ecosystems of the United States, to complement the efforts of the States and other Federal agencies to conserve fish and wildlife and their habitats, and to increase support for the System and participation from conservation partners and the public." *Fulfilling the Promise*, the guiding vision document for the System, calls for the U.S. Fish and Wildlife Service (Service) to

develop a nationally coordinated approach for prioritizing lands to support strategic growth of the System in areas of greatest conservation concern. Because we prepared current policy on land protection planning prior to these landmark legislative and planning directives, new policy is required to comply with these directives. Additionally, the decision process for adding proposing lands to the System differs from Region to Region and Congress has increased scrutiny on how the Service balances the continued habitat needs of fish, wildlife, and plants with the cost of restoring, managing, and administering additions to the System. The Service also needs more information on the biological justification for additions to the System and the true costs of adding lands to ensure that leadership at the Regional and Headquarters levels makes informed decisions affecting the growth of the System.

Sec. 5 What are the principles of the Service's land acquisition program?

a. The Service establishes new national wildlife refuges and expands existing refuge boundaries in order to fulfill the mission and goals of the System and the purpose(s) of individual refuges within the System.

b. The Service acquires land only when other means of achieving program goals and objectives, such as zoning or regulation, are not appropriate, available, or effective.

c. The Service acquires land and water interests including, but not limited to, fee-title, easements, leases, and other interests. We encourage donations of desired lands or interests.

d. The Service respects the rights and interests of private landowners. Service policy has and continues to be that we purchase lands from willing sellers. As a result, the lands within a given project boundary that are of greatest interest to the Service because of their biological importance are not necessarily the first made available by willing sellers. In some cases lands within a project boundary may never become available for purchase.

e. Law requires the Service to offer fair market value when acquiring lands. The Service must offer to buy the whole property when acquisition of only a portion of the property would leave the owner with an uneconomic remnant. The Service strives to minimize or eliminate any adverse impact on the landowner due to the acquisition process.

Sec. 6 How does this Order affect current and future policy on strategic growth? This Order supplements Section 2.4, Preliminary Planning of the policy in the Fish and Wildlife Service Manual (341 FW 2, Land Acquisition Planning,), and the Director's August 11, 2000, memorandum on land acquisition. It will remain in effect until we write a new Service manual chapter. We anticipate that this Director's Order will be in effect while we prepare new policy with direct participation by the States and active participation by other conservation partners.

Sec. 7 What are the major changes contained in this Order? This Order includes several major changes in the how we evaluate potential new lands for inclusion in the System. These changes ensure that we continue to wisely grow the System in terms of habitat *quantity*, *quality*, and *priority*, with due regard to the fiscal responsibilities and ramifications that come with growth. The changes include:

a. A clear priority favoring the completion of acquisitions within approved refuge boundaries over the expansion of existing refuges and the establishment of new refuges.

b. A more rigorous tie to goals and measurable objectives in national and regional habitat plans for trust resource species and a greater reliance on collaborative, science-based conservation planning to identify priorities.

c. National guidelines for deciding if lands are suitable for inclusion in the System.

Sec. 8 What is the Service's long-term vision for strategic growth of the System? During the next two years the Service will be developing its long-term vision for the growth of the System. As provided by the Refuge Improvement Act of 1997, we will develop the long-term vision in cooperation with our partners and the public based on national goals and priorities for protection of species, habitats, and ecosystems of greatest conservation concern, and complemented by efforts of the States and other Federal agencies.

Sec. 9 What steps will the Service take on an interim basis while a long-term vision and process for strategic growth is achieved? Strategically growing the System requires a set of criteria that guide conservation efforts toward those actions that most effectively and efficiently carry out refuge purposes, the mission and goals of the System, and the Service mission. The short-term vision for strategic growth of the System includes a set of clear priorities and guidelines designed to steer the Service's conservation efforts towards:

- a. The development of alternative approaches to land acquisition by the Service;
- b. A focus on the completion of existing refuges;
- c. The acquisition of only the highest quality conservation lands; and
- d. A control on the increase of operation and maintenance expenses borne by the Service.

Sec. 10 What are the Service's priorities for strategic growth of the System?

- a. The Service's first priority is the completion of acquisitions within approved refuge boundaries;
- b. The Service's second priority is to expand existing refuges where expansion is necessary to fulfill the purposes of the refuge and meet the mission and goals of the System. We generally identify this during the comprehensive conservation planning process. Expansions that address Service biological priorities and reduce management costs and/or increase opportunities for compatible wildlife-dependent recreation will be the priority;
- c. The Service's third priority is the establishment of new refuges in cases where there are outstanding fish and wildlife resources of national significance that either we or other parties cannot adequately conserve using other tools.

Sec. 11. How will we implement the Service's priorities for strategic growth?

- a. Each region recently conducted an evaluation of all currently authorized refuge acreages and the balance of acres remaining to be acquired, excluding areas that are no longer viable for acquisition. This will serve as the basis for prioritizing currently authorized areas.

b. Regional Directors will meet twice yearly to prioritize the acquisition of authorized refuge areas and projects in the planning phase, prepare a five-year acquisition plan, and develop out-year lists.

c. The five-year plan will include the following categories in priority order:

(1) Inholdings;

(2) Refuge expansions; and,

(3) New refuges.

d. The number of projects each year will be dependent on the anticipated acquisition funding for the upcoming year. We will place new refuges and expansions on the list only if we anticipate increased operations and maintenance funding in the “New and Expanded Refuges” category and to the amount anticipated. The Director will approve the list each year.

e. The Director approves proposals for new or expanded Refuges at two stages in the proposal process. The Director first approves projects prior to undergoing detailed planning. If the new project is approved at this stage, Regions undertake detailed planning including a NEPA review. Following detailed planning, the Director provides a second and final approval in establishing a new Refuge or expanding an existing Refuge.

Sec 12. What is the role of landscape-level biological planning in developing Regional priorities?

a. Scientific planning undertaken in collaboration with partners is essential to identifying the optimal conservation solutions for a given landscape. Without collaborative, science-based conservation planning, conservation efforts tend to be opportunistic rather than focused on the most important, cost-effective solutions. Developing biologically driven priorities at the regional and national scale is essential in ensuring that Service conservation investment is providing the greatest return for each dollar of public funds used.

b. In identifying conservation priorities, Regions should adhere to the following principles of conservation planning in producing Regional priorities:

(1) Adopt a collaborative biological planning process that provides guidance in stepping down national or regional objectives found in conservation plans developed by or in partnership with the Service (Recovery Plans, North American Waterfowl Plan, etc.) to the ecoregion and refuge level;

(2) Identify sound goals and measurable objectives for species and ecosystem types in collaboration with partners;

(3) Identify regional priorities for conservation targets (species and ecosystem types) based upon their global or national significance, ecological importance, viability, and level of threat, and;

(4) Identify regional geographic conservation priorities that communicate a clear focus and direction to partners and the public while providing a decision-support framework to guide conservation investment decisions.

Sec 13. What guidelines will the Director use to evaluate conservation proposals that expand an existing refuge or establish a new refuge? In evaluating conservation proposals that expand an existing refuge or establish a new refuge the Director will place a higher priority on proposals that adequately address the following guidelines:

a. Biological Guidelines

(1) Conserves a Priority Conservation Target *Additions should conserve a priority conservation target. Priority conservation targets are species, species groups, or ecosystem types selected for specific management objectives in a landscape planning unit. Regions should prioritize conservation targets based upon criteria established in collaboration with partners. At the national level, we will give priority to those species and/or ecosystem types that the Service has a mandated responsibility to protect.*

(a) Proposals that make a substantial contribution to the conservation of a targeted species and/or ecosystem types will receive a higher priority. The degree to which a proposed land acquisition significantly influences the viability of a particular species is variable between differing species and their population status. For example, a proposed 40-acre refuge that protects 20 percent of the known population of an endangered plant is easily a substantial contribution. However, a 10,000-acre refuge for waterfowl isolated from major flyways and not in the major breeding range would likely not be able to provide a substantial contribution to migratory bird conservation. On the other hand, a 2,000-acre wetland with one of 10 known colonies of Franklin's gulls would substantially contribute to that species conservation. The key is to address the contribution using historic and current information, other references, and population models as appropriate, and tie the contribution to overall population goals and objectives in the context of the larger landscape.

(b) In preparing a conservation proposal, quantify and qualify how the proposed addition contributes to objectives developed in existing conservation plans (identify source, e.g., North American Waterfowl Management Plan, Partners In Flight, endangered species recovery plans, habitat conservation plans). State why the current composition and quantity of conservation lands does not adequately protect the conservation targets identified in the proposal. We define conservation lands as lands, waters, or interests therein, held by State, Federal, local governments, and private conservation entities. Within the proposal, attach a map showing the study area, location of the habitats targeted, and their spatial relationship to other conservation lands. The proposal must clearly make the case that the addition provides substantial benefits to priority species and/or ecosystem types that are superior to benefits derived by alternative conservation options. Explicitly state alternative conservation options in the proposal. Furthermore, we must clearly state the consequences of not taking actions recommended by the proposal, specifically the expected impact on the specified conservation targets.

(2) Provides Habitat Connections *Additions should be networked with conservation lands to meet the targeted distribution and connection requirements.*

(a) The conservation proposal should identify the habitat distribution and connection needs of the conservation targets. Describe how the lands identified within the proposal are currently or could be appropriately networked with other conservation lands to meet these requirements. Explain how the proposal provides corridors to existing conservation lands to ensure genetic exchange and long term health for a species. For example, if the proposal is a necessary stepping-stone in association with other conservation lands for

migrating birds, provide explicit examples. Explain how other similar habitats are spatially arranged so that collectively with the proposal, all lands and waters are more structurally and functionally sound.

(b) If habitat connections are not required, explain why. For example, the conservation of an endangered species may necessitate land protection in an area not in close proximity to other conservation lands. In this case, the urgent need to prevent the extinction of an endangered species may outweigh the need to ensure that the new addition to the Refuge System is adequately networked. If this is the case, provide a detailed explanation as to why the proposed addition is the optimal choice in conserving the targeted species. Furthermore, explain how acquisition of the proposed land will ensure the viability of the species.

(3) Promotes Biological Integrity *Additions should encompass sufficient land and water to conserve (protect, restore, and manage) the structure and function of the project area and meet a life-cycle requirement for the target species.*

(a) Explain how the proposal includes sufficient size to adequately protect, restore, and manage the targeted trust species and their habitats. Identify the sufficient interest in land and water necessary to conserve (protect, restore, and manage) the structure and function of the project area. Describe whether the project area is sufficient to allow for necessary habitat management activities and satisfy spatial requirements of target species. Describe how the project would alleviate threats to the trust resources, including those caused by anticipated land use changes in the surrounding area such as residential, commercial, agricultural, subsurface developments, and rights of way.

(b) Explain how the proposal includes adequate water rights, availability of water, sufficient access, and whether there are deed restrictions or reserved subsurface rights that would interfere with management. Address proposed and existing uses or rights that may not be compatible with the primary purposes of this proposal. Include in the proposal how we will obtain sufficient interests through the acquisition of fee and easement interests, leases, and cooperative agreements?

(c) The Service's policy on Biological Integrity, Diversity, and Environmental Health (601 FW 3.17) states that we will take a proactive approach with partners to identifying lands that are critical for maintaining or restoring the biological integrity, diversity, and environmental health at all landscape scales.

(4) Invests in Healthy Lands *Additions should not be contaminated or impacted by off-site contamination to a level that may impair our ability to accomplish the project goals.*

(a) Review the Comprehensive Environmental Response Cleanup Liability Act (CERCLA) and other applicable databases for potential contaminants in the study area. Discuss the status of site investigations, potential liability or ongoing litigation, remediation, feasibility of the remediation without impairing our ability to protect or manage an area, and estimated cost.

b. Recreational Guidelines

(1) Improved Access *The Director will give special consideration to lands that improve access, where compatible, and/or compatible wildlife-dependent recreation of a refuge.*

c. Financial Guidelines

(1) Operations & Maintenance *The Director will give priority to expansion proposals, which contain acquisitions that lower overall management costs of a refuge, including cost per acre. Regions are expected to only submit conservation proposals if they can support the new project through projected increases within the operations and maintenance budget line item for new and expanded refuges.*

(2) Alternative Options *Regions are expected to make every effort to explore other avenues for conservation, including the Partners for Fish and Wildlife Program, Landowner Incentive Program, Private Stewardship Grants Program, Habitat Conservation Plan Land Acquisition Program, other grant programs both within and outside the Service, and technical assistance. Regions are required to document their efforts in exploring alternative solutions.*

Sec. 15. What is the relationship between comprehensive conservation planning and land conservation planning? The comprehensive conservation planning (CCP) process is citizen-centered and guides the management of the System refuge by refuge. The CCP for an individual refuge sets forth goals, objectives, and strategies that will enable the refuge to achieve its purpose(s) and help fulfill the mission of the System as a whole. CCP strategies to achieve stated goals and objectives may include proposals to modify the acquisition boundary of the existing refuge by either eliminating lands we have not yet acquired or expanding the boundary to cover additional lands. In addition, the CCP may identify lands outside of the current refuge acquisition boundary where management strategies are proposed, but we anticipate no Service acquisition or acquisition is one of several conservation options. In these instances, the Service will work with our partners to identify conservation opportunities. Such opportunities may include technical assistance, cooperative agreements, cost sharing, leases, easements, and/or acquisition by another partner. In this case, we can delineate the area outside the acquisition boundary as a “conservation boundary.” When we delineate a conservation boundary, the CCP will clearly state that the Service made no commitments for any type of acquisition within that boundary and that we require further planning and approval from the Director prior to any Service acquisition. This planning will occur with full public involvement in a step-down plan, during which the Service will explore various options for achieving the goals and objectives of the CCP. Furthermore, the CCP will include the following disclaimer language that expresses realistic expectations for implementation of the CCP:

Comprehensive conservation plans provide long-term guidance for management decisions; set forth goals, objectives, and strategies needed to accomplish refuge purposes; and identify the Service’s best estimate of future needs. These plans detail program planning levels that are sometimes substantially above current budget allocations and, as such, are primarily for Service strategic planning and program prioritization purposes. The plans do not constitute a commitment for staffing increases, operational and maintenance increases, or funding for future land acquisition.

Sec 16. What is the role of the State fish and wildlife agencies in the decision making process? Both the Service and the State fish and wildlife agencies have authorities and responsibilities for management of fish and wildlife on national wildlife refuges, as described in 43 CFR part 24. Consistent with the National Wildlife Refuge System Administration Act of 1966, (Administration Act) the Director of the Service will interact, coordinate, cooperate, and collaborate with the State fish and wildlife agencies in a timely and effective manner on the acquisition and management of national wildlife refuges. Under both the Administration Act and 43 CFR Part 24, the Director as the Secretary’s designee, will ensure that System regulations and management plans are,

to the extent practicable, consistent with State laws, regulations, and management plans. We charge refuge managers, as the designated representatives of the Director at the local level, with carrying out these directives. We will provide State fish and wildlife agencies timely and meaningful opportunities to participate in the development and implementation of programs conducted under this policy. This opportunity will most commonly occur through State fish and wildlife agency representation on the comprehensive conservation plan (CCP) planning team; however, we will provide other opportunities for the State fish and wildlife agencies to participate in the development and implementation of program changes made outside of the CCP process. Further, we will continue to provide State fish and wildlife agencies opportunities to discuss and, if necessary, elevate decisions within the hierarchy of the Service. Regional Directors will provide the Director of the affected State fish & wildlife agency the opportunity to comment on the proposal and will include a copy of their comments in the transmittal to the Director. Please refer to Director's Order 148, Coordination and Cooperative Work with State Fish and Wildlife Agency Representatives on Management of the National Wildlife Refuge System, for further direction on coordination with the States.

Sec 17. What is the effective date of this order? This Order is effective immediately. It will expire on [HOPE, INSERT DATE 1YR FROM DATE SIGNED] unless amended, superseded, or revoked. We will include the provisions of this Order in Part ____ of the Fish and Wildlife Service Manual.

Date:

Director